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ABSTRACT

This paper explores the question of who should be involved in strategic decisions that affect a school, a cluster of schools, or an entire school district. It discusses the common problems that hamper effective participation: such as workgroups that are too large or too small; selecting the same roster of persons to serve as team members; choosing participants from the top down, rather than from the bottom up; the failure to clarify expected levels of participation; and the tendency to reinvent the wheel. The article recognizes that grassroots involvement can lead to increased public ownership of schools, but such change requires educators to develop attitudes, beliefs, and practical skills that enable them to benefit from their community's increased involvement. The paper lists the eight steps for making participatory design efforts work: (1) define the results you want to achieve; (2) define the system you need to involve for the results you want; (3) form a temporary project-design team; (4) decide whether you want and/or need an outside consultant; (5) create a project-theme statement; (6) identify key participants; (7) recruit a project-management team; and (8) begin an appropriate strategic-planning process. The article gives some examples of participative planning. (RJM)

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> "It must be remembered that there is nothing more difficult, more doubtful of success, more dangerous to manage than the creation of a new system. For the initiator has the enmity of all who would profit by the representation of the old institution, and merely lukewarm defenders in those who would gain by the new one."

This cynical but insightful observation penned by Machiavelli in 1513 is a reminder that gaining support for any innovation is rarely as easy as we think it should be, or would like to believe it will be.

In the rapidly evolving and increasingly contentious world of education today, every call for innovation or improvement within our schools seems accompanied by legions of promoters and detractors. Innovations in student assessment, curriculum, instructional methods, and the myriad of other opportunities for educational improvement are examined in increasing detail by stakeholders who might be affected by the changes. Students, parents, and other stakeholders are not only more aware of their power to influence the system, but are increasingly willing to fight long and hard for whatever positions fit their interests.

The good news is that this grassroots involvement can lead to increased public ownership and more participative governance of our schools. The challenge is for educators to develop attitudes, beliefs, and practical skills that enable them to benefit from their community's increased involvement. Consequently, part of the job description for today's educational leaders--from the district superintendent to the classroom teacher--is the ability to forge meaningful participation and consensus among an increasingly diverse and demanding community of stakeholders.

At a practical level, what makes the question of participation in decision-making most vexing is that the perfect mix of participants on one issue may be unproductive on other issues. Trying to find the right balance of group size, composition, skills, attitudes, influence, and knowledge for any given issue or task is a monumental balancing act.

For example, the best combination for a site-based management team would be totally inappropriate for deciding the long-term future of a K-12 feeder-school cluster or an entire school district. The ideal group for site-based work would have the best local mix, while a district team should have interests and skills for a much broader focus (Wohlstetter and Mohrman 1996, Duffy 1997). Similarly, the best combination of people to decide on bus discipline policies is very different from the ideal group to formulate gang prevention/intervention policies. A multitude of variables come into play when making choices about whom to include in a given planning process: the scope of the decision at hand, who will be affected by what is decided, and who will actually implement the plan.

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The type of participation I want to explore includes perhaps the most delicate set of choices facing today's schools: "Who should be involved in decisions of strategic importance to a school, a cluster of schools, or an entire school district and the community it serves?" By "strategic importance" I mean those decisions that shape policies, procedures, and operations for the foreseeable future. Examples that come to mind are decisions relating to the central vision or mission of the district, the development of critical policies and procedures, and the introduction of new and/or potentially controversial programs. Such strategic plans require finely-tuned judgements on who and how many should be involved in decision making, what roles each person should play, and how long they should perform their designated functions.

Recognizing Common Problems That Hamper Effective Participation
In trying to expand participation, a few common problems cause innumerable headaches:

- Workgroups that are too large or too small
  Most of the research on small-group facilitation and effective meetings finds that the ideal group is between eight and fifteen people. This is generally true if we want to strike a balance between having a group that is big enough to represent various opinions, but still small enough to be manageable and allow everyone an opportunity to contribute. However, sometimes eight people are too many to get the job done quickly, or fifteen are not representative enough to develop a far-ranging decision.

  For example, in Madison County, Idaho, 40 adults and young people were selected to work on the design and recruitment plans for a county-wide youth services program. This large design team was needed to ensure representation and ownership by as many youth peer groups and adult constituents from throughout the county as possible. The trick is to match workgroup size to both the nature of the task and to the system that will implement their plans. Project descriptions at the end of this article give examples of how group size can be varied to meet different needs.

- Selecting obvious choices and "the usual suspects" for team members
  Often, when workgroups are formed, people are selected because of their titles, job descriptions, perceived power base, special skills, or just because they seem to work well on committees. I call these people the "usual suspects." The appeal of using the more common team selection methods and picking familiar people is understandable. However, when looking for new and creative approaches to on-going issues or when trying to involve previously under-represented groups (such as students), in the decision making process, group membership might be determined by taking a closer look at what each member brings to the group and the ability of each member to take action on the final results.

  Often, influential and well-informed people are found in unusual ways. For example, in one community where the growing population of Hispanic young people had been under-represented at planning sessions, it was suggested (somewhat jokingly) that a suspected gang member, (who was seen as very influential among other Hispanic youth), be temporarily released from jail to participate in an upcoming youth

services planning event. Although this suggestion was not acted upon, the need for Hispanic representation became clearer. Other, more available, but equally influential Hispanic youth were invited who added incalculable value to the results of the conference.

The need to look beyond the usual suspects was made forcefully by Lt. Allan Laird, of the Caldwell (Idaho) Police Department, and Chairman of the Caldwell Youth Coalition. Following a successful school-community planning event that recruited 400 volunteers, Lt. Laird noted, "We discovered people in the community who we had never heard of, but who exerted powerful influence for action--or inaction--with other people. Including them made an enormous contribution to our success."

- Selecting participants from the top-down, rather than the bottom-up
  It is tempting for the people at the top of any system, (including mayors, city council members, trustees, and school superintendents), to personally select participants for projects with strategic importance for "their" system. Their intentions are often to create a balanced slate of members and the best mix for ensuring useful results. But even the best-intentioned, top-down decisions can become political when controversial issues are involved. People affected by the decisions may become suspicious of underlying motives by those in power. Suspicion can quickly turn to manipulation, subtle sabotage, or worse.

  An effective way to side-step the problems of playing favorites in the selection process is to delegate the responsibility for choosing participants to an Ad Hoc or temporary Design Team. This group then uses the Community Referencing System (described later in this article) to identify participants who are seen as good choices by the broader community.

  The composition of a planning group is often as important as the decisions they reach. For highly controversial issues, it's wise for an ad hoc group to have broad representation of views–including voices of constructive dissent.. This was dramatically illustrated by recent protests aimed at President Clinton's National Advisory Group on Race Relations. Because that group did not include an American Indian, some felt that it neglected the interests of Native American people.

- Failure to Clarify Expected Levels of Participation
  Clarifying expectations is essential. Participation may range from total citizen control of the outcome, to being asked only to supply information to other decision-makers. (Wilcox 1994). Six possible positions on a ladder of increasing participation are:
  - Supplying information
  - Providing consultation
  - Making decisions
  - Taking action together
  - Having specific duties delegated to participants
  - Having complete control over planning, policy making, and program management.

  If expectations for levels of participation are not clear from the outset, the project

may engender misunderstanding and distrust among those involved.

- "Re-inventing the Wheel," Rather than Building on Past Successes
  Participative planning efforts often fall flat because they fail to connect with the people, products, and commitment generated by previous projects. When striking out on bold, new initiatives, planners sometimes overlook related projects in which people have already invested considerable effort. Ignoring these previous projects may result in apathy or resentment among team members.

  To counter these negative possibilities and to increase positive participation, the Madison County (Idaho) Youth Services planning group shared their recommendations with parents and young people involved in a similar local project, the America's Promise initiative. This resulted in a broader base of support while retaining the focus on positive alternatives for young people. Similarly, Nampa (Idaho) merged the energy generated by a recent Safe Communities planning process with an on-going Healthy Nampa-Healthy Youth project. Their actions resulted in a larger, more cohesive alliance between the schools and the larger community.

Eight Steps for Making Participatory Design Efforts Work
These relatively straightforward steps reduce or eliminate common problems with participation while maximizing student, parent, and community participation. This process, with slight variations, has proven effective in three decades of application within communities throughout the world (Weisbord 1992; Blick 1996; Emery and Purser 1997).

1. Define The Result You Want To Achieve
   Briefly describe the best possible outcome of this participatory process. Keep the description short. For example, a building level outcome might be " to update our discipline policies and procedures so as to create the best possible environment for learning and human relationships." A district level purpose might be "to develop district-wide policies and procedures for improving communication and cooperation across grade levels and among buildings."

   Stated the purpose in positive rather than negative terms. Research has consistently shown that focusing on a preferred future generates better participation and longer-lasting interest than using a problem-centered or deficiency-based statement of purpose (Lippitt, 1980, 1983). For example, a planning process designed to "create a meaningful learning environment that has the capacity for continuous improvement" will generate more long-term results than a conference designated to solve problems or overcome barriers to learning. Commenting on the enduring results of a K-12 feeder-school cluster strategic planning session, Pete Lundberg, Principal at Marysville (Washington) Middle School recently remarked, "The 'guiding principles' we produced are still very much in effect. We judge our progress by how well we adhere to those principles. I was pleased to note how new programs developed since the Search Conference have held true to that positive vision."

2. Define the System You Need To Involve For The Results You Want
   A system is best defined by the questions you are asking and the results you desire.

Said another way, a system can be any unit of organization or cluster of people and tasks that temporarily draws a boundary around itself for the purpose of planning (Emery and Purser 1997).

For example, if we want to plan for the future of education in our school district, we need to include the people, social service agencies, and other stakeholders that need to be represented for the process to produce significant and lasting results. The challenge is to make our definition of "system" large enough to include the people with useful information and influence relative to our purpose, but not so large as to overburden the planning process with more people than are necessary to get the job done.

That said, it is sometimes expedient to include large numbers of system representatives in a single event. For those situations, such statewide juvenile justice planning conference that draws 250 participants, there are large-group planning techniques that are effective with even a thousand people or more.

3. Form A Temporary "Project Design Team"
Here is where a small, diverse group of 6 to 10 people, representing the range of interests and demographics within a particular system, is most effective. As mentioned earlier, however, larger design groups are sometimes necessary to represent a wide range of vested interests or stakeholders within a system. Of course, as the group size grows, the difficulties of group decision-making and management also increase.

4. Decide Whether You Want And/Or Need An Outside Consultant
It is sometimes useful to bring in an outside consultant during early planning stages. For information and research, a technical consultant is helpful. Process consultants, by contrast, help organizations work more productively by facilitating group discussions and decision-making. While technical consultants supply factual information, process consultants help groups use information productively. Sometimes both technical and process consultation is necessary--especially for large or complex projects. For example, a Tobacco Prevention Task Force used a technical consultant to help gather and summarize data about the most effective tobacco prevention programs. A process consultant then helped the highly diverse task force work as a cohesive team.

When consultants are used, it is helpful whether the consultant has:

-expertise with similar systems
-experience with the process and product under consideration
-references from previous work who can be contacted
-proven ability to build internal capacity for future work, rather than continued dependency on the external consultant
-ability to build credibility for the project, (if necessary)
-willingness and ability to constructively direct conflict within the group, as well as the ability to constructively manage possible pressure from forces outside the project

Overall, does the planning group have a level of personal rapport and professional

assurance with the consultant that generates confidence in your collective ability to work closely together and produce useful results?

5. Create a Project "Theme Statement."
The theme of a participative project or event should be a short, catchy positive statement of purpose that captures the imagination and motivates the energy of the participants. For example, the design team for a recent community-wide planning event in Idaho decided that "Youth and Adults Working Together for a Better Future: It's Time to Speak up," captured the pro-active spirit and intention they wanted.

6. Identify Key Participants
An extremely effective means of identifying stakeholder groups and the best mix of participants for many planning processes is the Community Referencing System, mentioned earlier. This system was invented in Australia three decades ago and used extensively around the world since that time for school and community strategic planning (Emery and Purser 1996).

Once a specific purpose or theme for the project is identified, the Design Team can use the Community Referencing System to complete the following steps.

•*Draw a large social map of the system.* This should include all interest groups, stakeholder groups, demographic groups, and institutions that are part of the system. For example, a school district might have not only groups such as parents and students, but also various K-12 feeder schools, youth-serving organizations and agencies, and businesses that have a vital interest in the project theme. On a topic of broad interest or concern, system maps may include as many as 40 or more stakeholders.

•*Identify one or two people within each group on the map who are known to someone on the Design Team.* It is helpful if these people are actively concerned with the theme of the planning process, in either a negative or positive way. These people become the starting points for the Community Referencing System.

•*Contact these initial reference people and ask them to identify several people they know (either within or outside of the initial group) who they think:*

- are well-informed about the theme of the planning process
- have high influence within the system (formal or informal)
- have links with other stakeholder groups
- will be affected by the results of the process
- are able to take action based on the results of the process, or can block progress on action plans if not included.

After gathering these new names, call them. Don't invite them to participate at this point, but ask them the same questions as you did the first group. Continue this process of gathering names for 2-4 iterations, until the same names begin to appear. Match the recurring names to the social map of the project. These individuals, selected by others in the system, become the pool of potential participants for whatever strategic planning process you use.

This process was used recently with great success in selecting participants for a series of community-wide Safe Communities planning sessions in Idaho, a middle school planning process in Washington state, and a school-community youth services design event for an entire county in Idaho. The results were well worth the extra time and effort. In each case, the Community Referencing System identified key people who were advantageous for the success of the strategic planning process, but who might have been overlooked by less structured selection methods.

7. Recruit A Project Management Team
   Identify people, preferably volunteers, to manage the logistics, invitations, refreshments, and other details of your strategic planning process. Using young people for some of these functions gives them valuable experience in service to their school or community, as well as building support for overall success of the project. People tend to support the results of projects that they help create. In the words of Emily Goodliffe, a junior high student, "I saw ways that I could become involved in the community, ways that I can help others and ways I can bring about positive changes to help make our community a better place to live."

8. Begin An Appropriate Strategic Planning Process
   There are dozens of strategic planning processes--each designed to work under specific conditions and generate unique results. Remember that "form follows function." When well-matched to existing needs, a strategic planning process clarifies the mission of a system, energizes the vision of a positive future, and generates viable action plans. But most importantly, a strategic planning process mobilizes passion and commitment among all members to work as a team in getting their collective and individual work done.

Examples of Participative Planning
The following short summaries illustrate ways that students, parents, and community members have joined schools as partners for strategic planning.

Marysville (Washington) Middle School

Theme: "To better meet the needs of the Marysville Middle School Community, how can we create a meaningful learning environment that has the capacity for continuous improvement?"
System: The K-1 2 feeder-schools.
Participants: A Search Conference of 40 people, drawn from the staff, families, and students at the middle school, the high school, the three feeder elementaries, the central office, and youth serving agencies for a K-12 cluster of schools.
Results: Three days of intensive planning generated consensus on nine guiding principles with action plans for the improvement of education within the K-12 cluster. The guiding principles became the on-going standard against which all prospective school-based decisions were measured.

Tulalip Tribes and Marysville (Washington) School District

Theme: "How can the Tulalip Tribes and the Marysville School District best work

together to address education, sociological, and cultural concerns that affect student learning?"
System: Members of the Tulailp Tribes and the Marysville School District, as well as non-tribal parents and community members living on the reservation.
Participants: A Core Team of 15 people, recommended by and representing the school district and tribal board of directors.
Results: After a year of meeting with constituent groups to refine suggestions, the school district and tribal board of directors approved a document outlining nine recommendations for policy and procedures changes, funding, and staffing commitments. The recommendations help assess and improve all aspects of district-tribal education.

Madison County, Idaho

Theme: "Youth and Adults Working Together for a Better Future: It's Time to Speak Up"
System: Young people and adults from Madison County, Idaho.
Participants: 150 young people, (5th grade and older), and adults, representing all of the stakeholder groups, schools, and two communities.
Results: During three days of meetings, participants generated 25 reports and consolidated them into 18 prioritized issues. They developed action plans for the top 15 issues, and are currently implementing them in cooperation with the local "America's Promise" group.

As a consultant and enthusiastic supporter of each of these projects, I worked with each of them from the first design stages though the never-ending process of implementing action plans, evaluating results, and then refining again. Some of the projects could be judged, by most measures, to be outstanding successes. Others are still struggling for school or community acceptance. All of the projects, however, profited enormously from the inclusion of students, parents, and community members as valued assets in the planning process.

References

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